



Global Tomato Ketchup Market

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 19.4 bn
Forecast (2031)	USD 27.3 bn
CAGR (2021-2031)	5.9%
Study period	2021-2031
Largest region	North America · 33.4%
Fastest-growing region	Asia-Pacific · 7.1%
Market concentration	Moderate
Licence	Individual / Company

The global tomato ketchup market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. North America led with XX% of 2025 revenue, supported by high household penetration and dense quick-service restaurant demand, while Asia-Pacific will record the fastest regional CAGR at XX%. Conventional ketchup remains the volume anchor, but reduced-sugar, clean-label and flavor-led products are capturing incremental value. The report quantifies demand across product type, packaging, sales channel, retail channel, end use and geography, with company-level competitive analysis and country forecasts.

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Executive summary

The global tomato ketchup market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. North America led with XX% of 2025 revenue, supported by high household penetration and dense quick-service restaurant demand, while Asia-Pacific will record the fastest regional CAGR at XX%. Conventional ketchup remains the volume anchor, but reduced-sugar, clean-label and flavor-led products are capturing incremental value. The report quantifies demand across product type, packaging, sales channel, retail channel, end use and geography, with company-level competitive analysis and country forecasts.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global tomato ketchup revenue reached USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Global value growth will run at a XX% CAGR during 2025-2031.
- North America accounted for XX% of global 2025 revenue.
- Asia-Pacific will grow at a XX% CAGR, the fastest rate among the five assessed regions.
- Conventional ketchup generated XX% of 2025 value, while no-added-sugar and reduced-sugar ketchup will grow at an XX% CAGR.
- PET squeeze bottles represented XX% of 2025 sales because they combine convenience, low breakage and efficient logistics.
- Retail channels supplied XX% of market value, with foodservice accounting for the remaining XX%.
- World Processing Tomato Council data placed the 2024 processing-tomato crop at XXX tonnes and its 2025 estimate at XXX tonnes.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Tomato Ketchup Market Trends and Growth Drivers

Tomato ketchup is a mature staple with a changing value equation. Consumption occasions remain familiar, but growth now comes from foodservice expansion, flavor architecture, nutrition reformulation and packaging functionality rather than simple household penetration in developed markets.

Agricultural supply is the principal upstream variable. The processing-tomato crop rose to XXX tonnes in 2024 before the 2025 estimate fell to XXX tonnes, raising the strategic importance of paste inventories, contract coverage and sourcing diversity.

Competitive advantage increasingly rests on linking global scale with local relevance. Large suppliers possess procurement, marketing and foodservice reach, while regional companies can gain share through local sweetness, spice and texture preferences, affordable pack sizes and faster retailer response.

Growth drivers

Quick-service restaurant network expansion

Quick-service restaurants create repeat ketchup demand across dine-in, takeaway and delivery orders. Chain standardization favors suppliers that can deliver consistent viscosity, taste and portion economics across bulk dispensers, sachets and dipping cups.

Emerging-market household penetration

Urban households are adding packaged ketchup as western-style snacks, fried foods and convenience meals become more frequent. Smaller packs and locally calibrated price points are extending distribution beyond metropolitan supermarkets.

Health-oriented recipe renovation

Reduced-sugar, no-added-sugar and lower-sodium recipes are turning a mature condiment into a higher-value portfolio. Reformulation also helps established brands defend family usage occasions against perceptions that conventional ketchup contains excessive sugar or salt.

Flavor-led premiumization

Spicy, smoky, pickle-infused and regionally inspired variants command higher unit prices and generate retailer news. Limited editions also recruit younger consumers without forcing manufacturers to replace the core tomato formulation.

Convenient dispensing and portion formats

Inverted squeeze bottles, clean-dispense closures and portion packs reduce mess and improve control for households and operators. Packaging functionality supports brand differentiation and raises willingness to pay in otherwise comparable formulations.

Modern retail and e-commerce reach

Supermarket expansion improves shelf visibility, while online grocery supports multipacks, premium variants and subscription purchasing. Digital merchandising also gives smaller condiment brands a route to market without immediately matching incumbent physical distribution.

Restraints

Processing-tomato crop volatility

Ketchup economics are exposed to contracted tomato acreage, agricultural yields, energy inputs and paste inventories. The decline from the 2024 processing crop to the 2025 estimate tightened procurement conditions and increased the value of geographic sourcing diversification.

Sugar and sodium scrutiny

Nutrition policy and front-of-pack labeling can reduce the appeal of traditional recipes and require costly portfolio renovation. The pressure is greatest where ketchup competes for family consumption and institutional foodservice contracts.

Private-label price competition

Retailers use ketchup as a high-visibility value category, compressing the price ladder between private labels and secondary brands. Manufacturers without distinctive formulation, packaging or foodservice positions face weaker promotional returns.

Packaging compliance costs

Extended producer responsibility, recycled-content requirements and restrictions on difficult-to-recycle components increase conversion spending. Smaller manufacturers carry a disproportionately high burden because packaging redesign and qualification costs are spread across lower volumes.

Tomato Ketchup Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Quick-service restaurant network expansion	XXX	XXX	XXX
Emerging-market household penetration	XXX	XXX	XXX
Health-oriented recipe renovation	XXX	XXX	XXX
Flavor-led premiumization	XXX	XXX	XXX
Convenient dispensing and portion formats	XXX	XXX	XXX
Modern retail and e-commerce reach	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Processing-tomato crop volatility	XXX	XXX	XXX
Sugar and sodium scrutiny	XXX	XXX	XXX
Private-label price competition	XXX	XXX	XXX
Packaging compliance costs	XXX	XXX	XXX

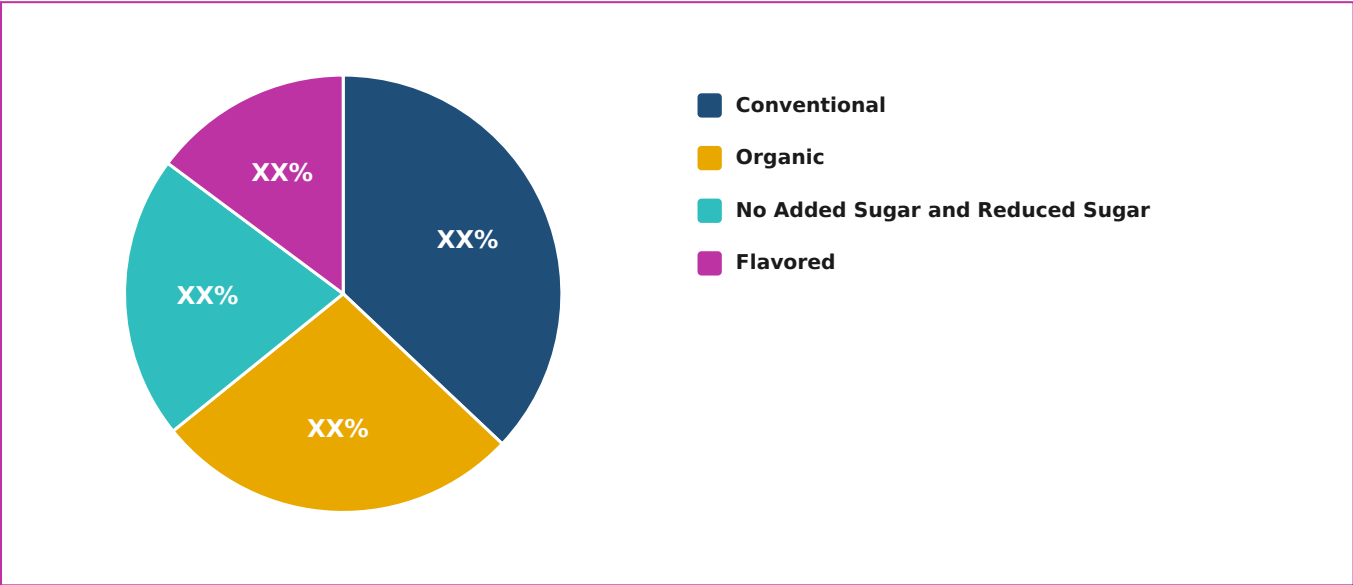
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Tomato Ketchup Market Segmentation Analysis

By Product Type

Conventional ketchup remains the category's reference taste and benefits from broad distribution, familiar recipes and foodservice scale. Reduced-sugar and no-added-sugar variants are expanding fastest as families and institutional buyers scrutinize nutrition panels. Organic products retain a premium niche, while flavored ketchup drives trial through spicy, smoky and pickle-led propositions.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

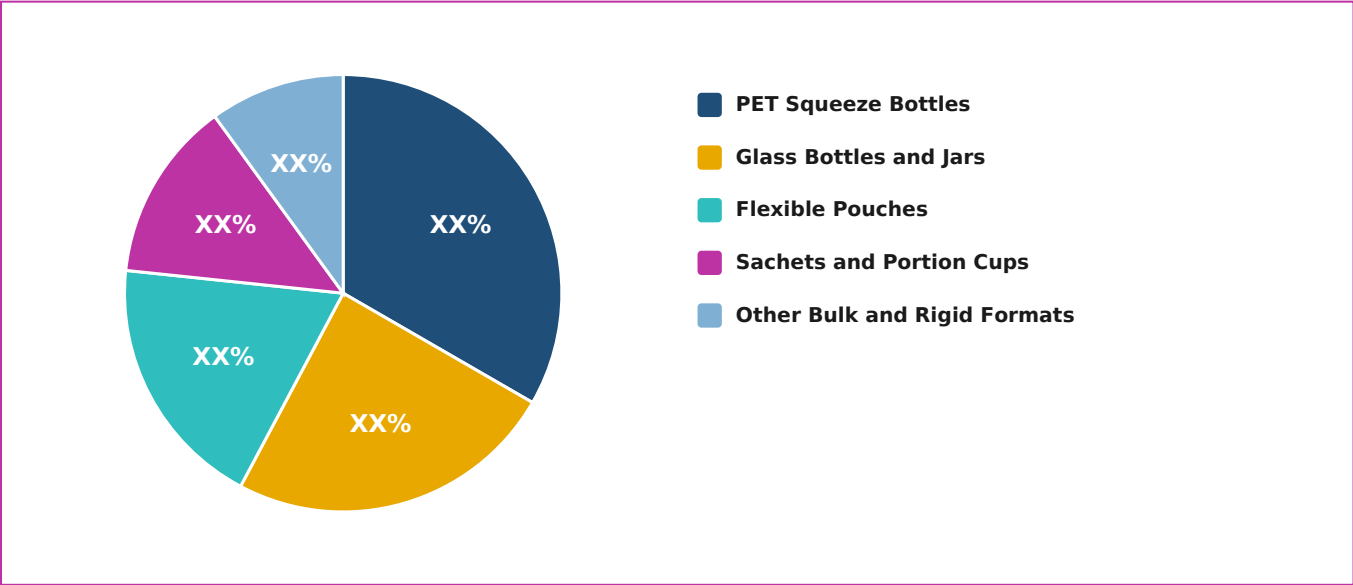
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
No Added Sugar and Reduced Sugar	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flavored	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

PET squeeze bottles lead because they combine low breakage, inverted dispensing and efficient shipping weight. Glass retains a premium and food-trust position but faces transport and convenience disadvantages. Flexible pouches are gaining in refill and value formats, while sachets and portion cups remain integral to takeaway foodservice.

Value share by packaging, 2025



Source: XXX

Value by packaging, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
PET Squeeze Bottles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Glass Bottles and Jars	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flexible Pouches	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sachets and Portion Cups	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Bulk and Rigid Formats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Retail leads because ketchup remains a high-penetration household staple with strong supermarket visibility. Foodservice generates concentrated volumes through quick-service restaurants, casual dining, catering and delivery meals. Foodservice growth will outpace retail as chain restaurant networks expand across developing cities.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Retail Channel

Supermarkets and hypermarkets retain leadership through assortment breadth, private-label visibility and promotional frequency. Online retail is the fastest-growing route as multipacks and specialty flavors fit digital shopping baskets. Discounters strengthen private-label competition, while convenience stores focus on smaller packs and immediate meal occasions.

Value by retail Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Supermarkets and Hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Convenience Stores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Discounters and Other Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End Use

Household use dominates through consumption with fries, burgers, eggs, snacks and home-prepared convenience meals. Quick-service and casual restaurants deliver higher throughput per location and create valuable branded visibility. Institutional catering remains smaller but is strategically important for portion control and nutrition-compliant formulations.

Value by end Use, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Households	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Quick-Service and Casual Restaurants	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Institutional Catering and Other Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

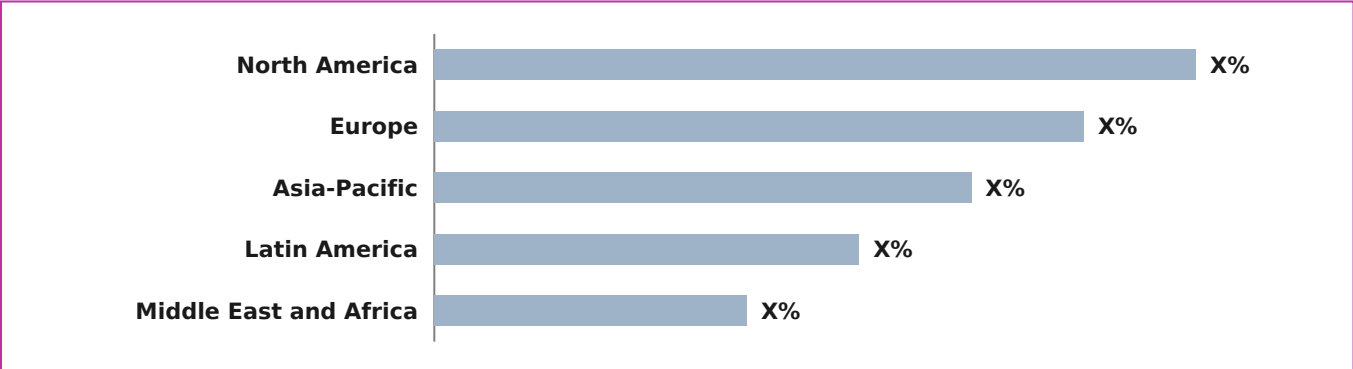
Tomato Ketchup Market Regional Analysis and Country Outlook

North America generated XX% of 2025 market value. The United States anchors the region through high household penetration, extensive quick-service restaurant usage and a wide branded-to-private-label price ladder; Canada adds demand for organic, natural and bilingual-packaged products. Growth will come primarily from price-mix, reduced-sugar formulations and foodservice formats rather than first-time category adoption.

Europe represented XX% of 2025 revenue, with the United Kingdom, Germany, France, Italy and Spain forming the principal country markets. Retailer private labels exert substantial price pressure, yet premium recipes, high tomato content and recyclable packaging support differentiation. Italy, the Netherlands and Spain also occupy important positions in the HS 210320 export network.

Asia-Pacific held XX% of 2025 value and will advance at a XX% CAGR through 2031. China and India supply the largest incremental revenue pool as organized restaurant chains, delivery platforms and modern retail extend category access, while Japan and South Korea support higher-value demand. Local flavor adaptation, small affordable packs and regional manufacturing will determine share gains.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Tomato Ketchup Market Competitive Landscape and Company Share

The tomato ketchup market is moderately concentrated: Kraft Heinz leads through the global Heinz franchise, while Unilever, Del Monte Foods, Conagra Brands, Nestlé, Kagome and strong regional manufacturers compete across retail and foodservice. Leadership depends on brand salience, tomato-paste procurement, route-to-market breadth and the ability to serve both consumer bottles and high-volume operator formats.

Competition is moving beyond conventional recipe parity. Leading suppliers are using reduced-sugar platforms, flavor extensions, distinctive dispensing technology and global marketing to increase revenue per kilogram, while retailers are strengthening private-label ranges at opening and premium price points. Foodservice contracts remain strategically important because they combine predictable volume with visible brand placement.

Kraft Heinz's planned separation places Heinz within a focused taste-elevation company, sharpening strategic attention on sauces and condiments. Across the industry, capital allocation is favoring flexible filling lines, packaging redesign, regional co-manufacturing and agricultural supply resilience rather than broad greenfield ketchup capacity.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
The Kraft Heinz Company	XXX	XXX	XXX	XXX
Unilever PLC	XXX	XXX	XXX	XXX
Del Monte Foods, Inc.	XXX	XXX	XXX	XXX
Conagra Brands, Inc.	XXX	XXX	XXX	XXX
Nestlé S.A.	XXX	XXX	XXX	XXX
Kagome Co., Ltd.	XXX	XXX	XXX	XXX
McCormick & Company, Incorporated	XXX	XXX	XXX	XXX
General Mills, Inc.	XXX	XXX	XXX	XXX
TreeHouse Foods, Inc.	XXX	XXX	XXX	XXX
Orkla ASA	XXX	XXX	XXX	XXX

Source: XXX

Tomato Ketchup Market Forecast and Strategic Opportunities

The market will add USD XXX billion between 2025 and 2031. Volume gains will concentrate in Asia-Pacific, Latin America and selected Middle Eastern markets, while North American and European expansion will depend on premium mix, foodservice recovery and recipe renovation.

The central forecast assumes normalized processing-tomato availability after the 2025 contraction, sustained quick-service restaurant expansion and continued retail price discipline. A tighter-crop scenario would lift nominal revenue through pricing but constrain promotional intensity and private-label margins; a faster reformulation scenario would accelerate value growth in reduced-sugar and lower-sodium lines.

Share winners will align tomato sourcing, formulation and packaging decisions rather than treating them as separate functions. Scalable local flavors, clear nutrition propositions, recyclable dispensing systems and dependable foodservice service levels will produce the strongest returns.

Opportunities

- Localized spicy, smoky and sweet flavor profiles
- No-added-sugar ketchup for family and wellness-oriented households
- Foodservice dispenser systems with lower packaging use
- Affordable single-serve sachets for emerging markets
- Organic and traceable tomato sourcing
- E-commerce multipacks and direct-to-consumer flavor bundles

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